

How to Create a general Client Services Ticket

Two ways to create a ticket

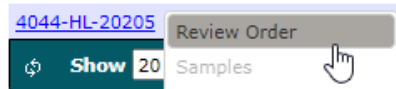
1. Quick Links>>Client Services Request

a. Click Create Ticket Button

The screenshot shows the 'Client Services Request' form. On the left is a navigation menu with 'Client Services Request' highlighted in a red box. The main form contains patient information (Zztest, Baby11, MRN: 565845), collection details (date: 12/29/2022, time: 11:45 AM), and ordering information. A modal dialog titled 'Client Services Request' is open, showing buttons for 'Request Supplies', 'Create Ticket' (indicated by a red arrow), 'My Past Requests', and 'Cancel'. Below the modal are 'Save Patient' and 'Create Ticket' buttons.

2. From a specific order:

a. Search for an existing order, right click on the order and select Review Order.



b. On the order screen click the Create Ticket button. (The order must be saved before this button is enabled.)

The screenshot shows the order details page for 'Zztest, Baby11'. The order ID is 42254-on-22363 and the status is 'NO RESULTS'. The form contains patient information, collection details, and ordering information. At the bottom right, the 'Create Ticket' button is highlighted with a red box. Below the form is an 'Order Choices' section and a search field.

Ticket Screen

Zztest, Cougar
10m F
PID: C202204169787 Patient

Order ID: NEW ORDER

A signed physician's order

Patient: Zztest
Collection Location: ..Test
Collection Date: 12
Ordering Location: ..Test
Order Date: 12
Ordering Provider: ..Lab
Submitter SID:

Newborn Screening Only: NBS, NBS, NIC

Order Choices

Order Choice Search:
Filter by List: All

Order Choice: IC
Newborn Screening Panel 1
Newborn Screening Panel 2

Documentation and Action

Print Labels, Clinical Info, Req, Lin

Create Ticket

Item ID:

Client: ..Test Location

Reason:

Summary:

Description:

Create New

Relationship	Type	Name	Link Date (MST)	Edit	Release Held Results	Add Comments
No matching records found						

Save Cancel

To submit a new ticket

1. The client field should automatically be filled in for the location you are signed in as.
2. Select the appropriate **reason** for the ticket from the dropdown list.
3. Enter a title for the ticket in the **summary** field.
4. Enter details in the **description** field (put necessary contact information in the description if a specific person needs follow up).
5. Save the ticket using the **save** button (you must save prior to adding a link).
6. Optional: to create a link, click the link button. Select the type of link you would like to create.
 - a. To link a location, order, patient, or provider- search for the item you want to link, select it and click save. (The client attached to the ticker is automatically linked. If the ticket is opened from an order, the order and patient will automatically be linked.)
 - b. To link a document, when the screen pops up, click "Switch to Browser Upload."

Examples of why you would submit a general ticket

1. You have a question or an issue.
2. You discover an issue with an order that needs investigation/resolution (something that needs immediate attention still needs to be handled with a phone call).
3. You needed a demographic change on an order (this needs linked documents to verify the change).
4. You have a billing issue or inquiry.
5. You need to request a report.